



# **Basic System Administration & Reports Training Guide**

**Compiled April 2009**

# Evergreen Basic System Admin Guide

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*This guide brings together documentation from several current Evergreen customers, including Evergreen Indiana and SITKA. All documentation can be accessed @ [http://evergreen-ils.org/dokuwiki/doku.php?id=community\\_tutorials](http://evergreen-ils.org/dokuwiki/doku.php?id=community_tutorials)*

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  - <http://www.georgialibraries.org/pines/pines-evergreen-reports-documentation>
  - Step by Step Examples start on Page 38.



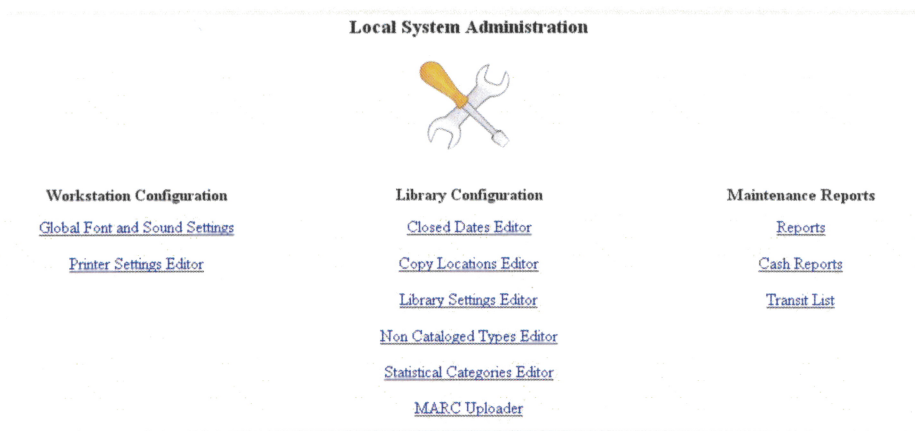
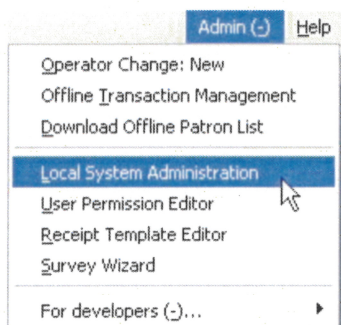
## Local System Administration

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This tip sheet will illustrate the options available in the Local System Administration interface. You need to be logged in as a Local System Admin to change the Closed Dates Editor, Library Settings Editor and access the Reports interface.

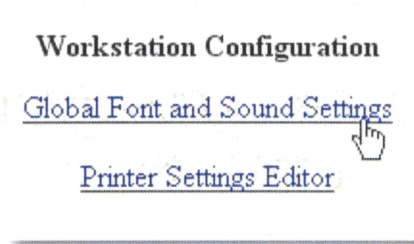
A staff person with lower permission level than a Local System Admin, like a circulator or circ/cat, can make changes to the Global Font and Sound Settings, Printer Settings Editor, Copy Locations Editor, Non Catalogued Types Editor, Statistical Category Editor, run Cash Reports, and run a Transit List.

To access *Local System Administration* click *Admin (-)* at top right of screen then select *Local System Administration*.

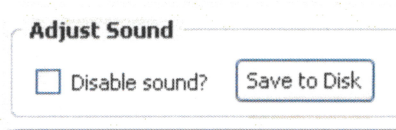


## Global Font and Sound Settings

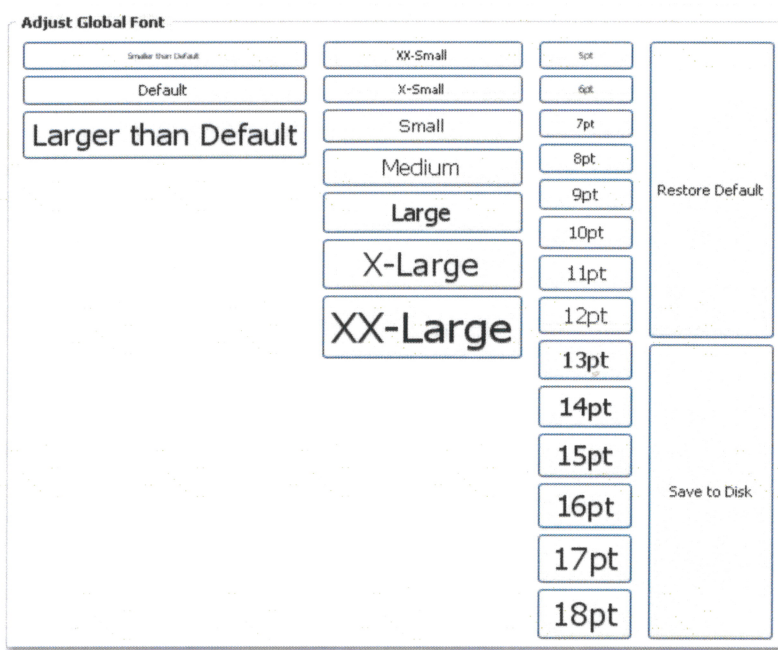
1. Select *Global Font and Sound Settings* under *Workstation Configuration*.



2. To turn off the system sounds, like the noise that happens when a patron with a block is retrieved check the disable sounds box and click *Save to Disk*.



3. To change the size of the font, pick the desired option and click *Save to Disk*.

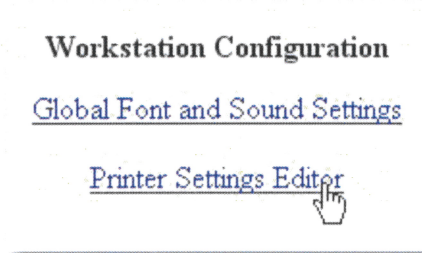


### NOTE

Changing the font size changes the size of the font for the buttons, but not everything on the screen.

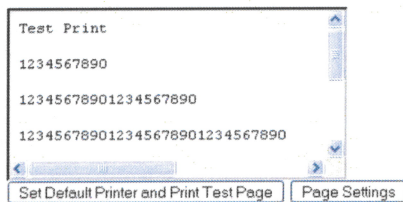
## Printer Settings Editor

1. Select *Printer Settings Editor* under *Workstation Configuration*.



2. From this screen you can print a test page, or alter the page settings for your receipt printer.

### Normal Settings

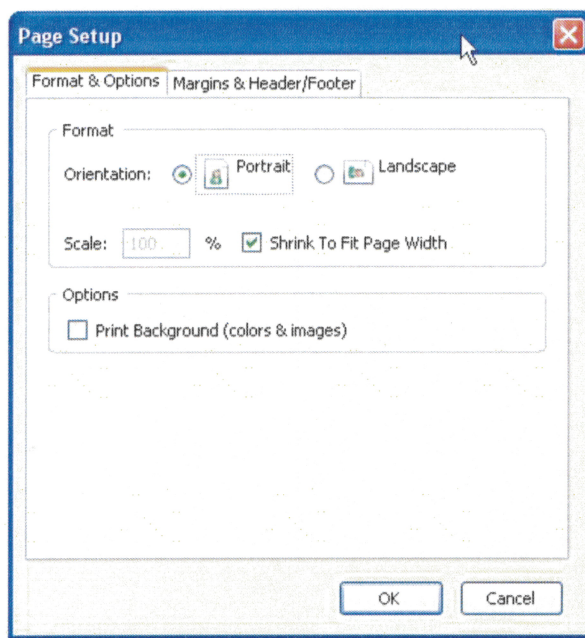


### Advanced Settings

☐ Use default print strategy (Mozilla Print) ☐ Use alternate print strategy (DOS LPT1 Print)

**Warning:** The alternate (DOS LPT1) print strategy will ignore the printer settings made in the "Normal Settings" section. In Windows, you must map your printer to the LPT1 port, under Start Menu -> Printers and Faxes -> your printer -> right-click, Properties -> Ports. Also, HTML styling such as different font weights and sizes will be lost when using the DOS LPT1 print. Data is sent to the printer as simple text in this case.

3. Click on *Page Settings* to change printing format and option settings. Click on the *Margins & Header/Footer* tab to adjust

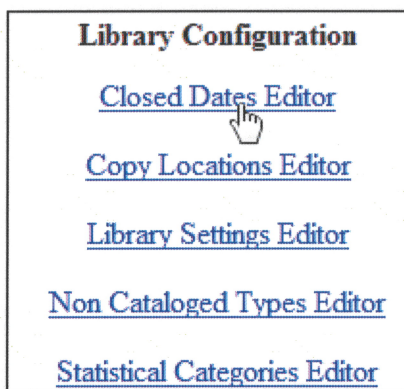


#### **TIP**

The Printing Settings Editor is primarily for making adjustments for your receipt printers. If you are having problems with formatting spine labels, see the [Georgia PINES Spine Label Tip Sheet for Dot Matrix Printers](#).

#### **Closed Dates Editor**

1. Select *Closed Dates Editor* under *Library Configuration*.





2. Select *Add Multi-Date Closing* if your closed dates are entire business days.

Welcome

### Closed Dates Editor

Edit Closed Dates for: Terrace

Closed Duration	Reason for Closing	Delete
All Day 2008-05-13	Training	<input type="button" value="delete"/>
From 2008-06-12 at 09:00:00 through 2008-06-12 at 13:00:00	conversion recovery	<input type="button" value="delete"/>
All Day 2008-07-01	Canada Day	<input type="button" value="delete"/>
Every Day From 2008-07-25 through 2008-07-28	Pemberton Music Festival	<input type="button" value="delete"/>

Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM

3. Enter applicable dates and a descriptive reason for the closing and click *Save*.  
Check the *Apply to all of my libraries* box if your library is a multi-branch system and the closing applies to all of your branches.

Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM

All Day From 2008-12-21  Through 2009-01-04

Reason for closing:

Winter holidays

Apply to all of my libraries ☐

### TIP

These dates are in addition to your regular library closed days that the migration team hard coded into the system. If your regular closed days change, please contact support. Both regular closed days, and closed dates that are entered in the Local System Admin panel affect due dates and fines.



You can type dates into fields using YYYY-MM-DD format or use calendar widgets to choose dates.

If your closed dates include a portion of a business day, select *Add Detailed Closing* at Step 3 and include hours as described below.



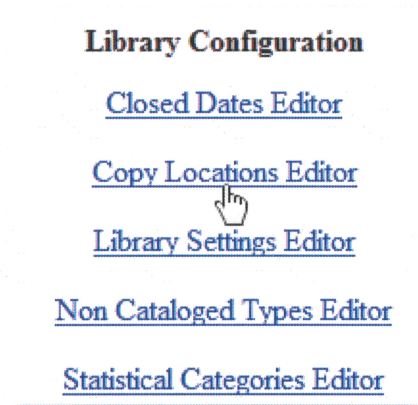
4. Enter detailed hours and dates and click *Save*. Time format must be HH:MM.

Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM

Start Date	Start Time		End Date	End Time	
<input type="text" value="2008-12-21"/> 	<input type="text" value="13:00"/>	All Day <input type="checkbox"/>	<input type="text" value="2009-01-04"/> 	<input type="text"/>	All Day <input checked="" type="checkbox"/>
Reason for closing:					
<div><div>Winter holidays</div></div>					
Apply to all of my libraries <input type="checkbox"/>					
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

## Copy locations editor

1. Select *Copy Locations Editor* under *Library Configuration*.



2. You can create new copy locations, or edit existing copy locations. To create a new shelving location type in the name, and select Yes or No for the various attributes. A copy location can be OPAC Visible-yes or no, Holdable-yes or no, or Circulate-yes or no. Holdable means a patron is able to place a hold on an item in this location. Finally click *Create*.

A screenshot of the 'Copy Locations Editor' form. The form is titled 'Copy Locations Editor' and has a subtitle 'Create a new copy location'. It contains several fields and radio buttons: 'Name:' with a text box containing 'Art books', 'Holdable:' with 'Yes' (selected) and 'No' radio buttons, 'OPAC Visible:' with 'Yes' (selected) and 'No' radio buttons, 'Circulate:' with 'Yes' (selected) and 'No' radio buttons, and 'Owning Library:' with a dropdown menu showing 'Terrace'. A red circle highlights the 'Create' button at the bottom right of the form.

## NOTE

There are also options in the Copy Editor for a copy to be OPAC Visible-yes or no, Holdable-yes or no, or Circulate-yes or no. If either the copy record or the shelving location is set to Circulate-no, then the item will not be able to circulate.

The screenshot shows the 'Copy Editor' window with the 'Circulation (2)' tab selected. The 'Circulate?' field is set to 'Yes' and the 'OPAC Visible?' field is set to 'Yes'. Both fields are highlighted with red boxes. Other tabs include Identification, Location (1), Miscellaneous (3), and Statistics (4). The 'Status' is 'In process', 'Barcode' is '26876598', 'Creation Date' is '2008-07-30', 'Creator' is 'tara', 'Last Edit Date' is '2008-07-30', and 'Last Editor' is 'tara'. The 'Shelving Location' is 'Juvenile books'. The 'Circulation Library' is 'BTE'. The 'Owning Lib : Call Number' is 'BTE : SCIE'. The 'Copy Number' is '<Unset>'. The 'Age Protection' is '<Unset>'. The 'Loan Duration' is 'Normal'. The 'Fine Level' is 'Normal'. The 'Circulate as Type' is '<Unset>'. The 'Circulation Modifier' is '<Unset>'. The 'Alert Message' is '<Unset>'. The 'Deposit?' is 'No'. The 'Deposit Amount' is '0.00'. The 'Price' is '0.00'. The 'Reference?' is 'No'. The 'Library Filter' is 'BTE : Kids Books'. The 'BTE : Vendor' is '<Unset>'. The 'SITKA : Gift Item' is 'Yes'.

3. In the bottom part of the Copy Locations Editor you can edit or delete existing copy locations. You cannot delete a location that contains items. In this example the copy location *Kids books* is being edited.

Name	Owning Library	Holdable ??	OPAC Visible	Circulate	Edit	Delete
Art books	Terrace	Yes	Yes	Yes	Edit	Delete
Juvenile books	Terrace	Yes	Yes	Yes	Edit	Delete
Kids books	Terrace	Yes <input checked="" type="radio"/> No <input type="radio"/>	Yes <input checked="" type="radio"/> No <input type="radio"/>	Yes <input checked="" type="radio"/> No <input type="radio"/>	Submit	Cancel
New books	Terrace	Yes	Yes	Yes	Edit	Delete
Olympics Display	Terrace	No	Yes	Yes	Edit	Delete
Reference	Terrace	No	Yes	No	Edit	Delete
Shannon Dineen Black Beauty Collection	Sitka Consortium	Yes	Yes	Yes	Edit	Delete
Stacks	Sitka Consortium	Yes	Yes	Yes	Edit	Delete
Storytime Collection	Sitka Consortium	Yes	Yes	Yes	Edit	Delete



This is where you see the shelving locations in the Copy Editor:

The screenshot shows the 'Copies' window with the 'Copy Editor' tab active. The 'Location (1)' dropdown menu is open, displaying a list of shelving locations. The location 'BTE : Juvenile books' is highlighted. Other locations in the list include 'BTE : Art books', 'BTE : New books', 'BTE : Olympics Display', 'BTE : Reference', 'SITKA : Shannon Dineen Black Beauty Collection', 'SITKA : Stacks', and 'SITKA : Storytime Collection'. The 'Copy Number' is set to '<Unset>' with '1 copy' indicated.

This is where the shelving location appears in the OPAC.

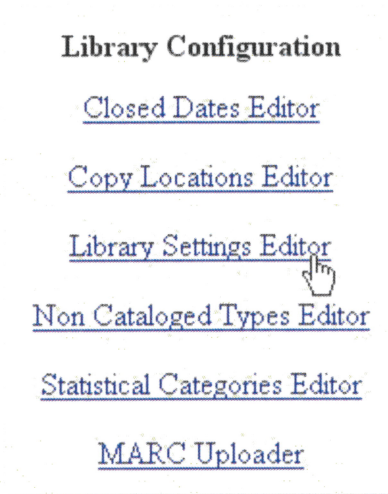
The screenshot shows the OPAC record for 'The Stinky Cheese Man and other fairly stupid tales' by Jon Scieszka. The record includes fields for Title, Author, ISBN, Edition, Publication Date, Publisher, Physical Description, Format, and Abstract. Below the record, there are tabs for 'Copy Summary', 'Shelf Browser', and 'MARC Record'. The 'Shelf Browser' tab is active, showing a table of copy information for all libraries. The table has columns for Library, Callnumber, Actions, Available, Checked out, In process, In transit, Reshelving, On holds shelf, and On order. The 'North Coast Library Federation' is listed with the callnumber 'SCIE'. The 'Location' column shows 'Juvenile books', which is circled in red.

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>North Coast Library Federation</b>									
Terrace	SCIE	<a href="#">details</a> <a href="#">browse</a>	0	0	1	0	0	0	0

Barcode: 26876598  
Status: In process  
Location: Juvenile books

## Library settings editor

1. Select *Library Settings Editor* under *Library Configuration*.



2. This is where you can enter your lost materials processing fee, default price for items, OPAC and staff inactivity timeout.

A screenshot of the 'Library Settings Editor' web form. At the top, it says 'Library Settings Editor' and 'Edit Settings for : Terrace'. Below this is a table with settings for 'Terrace'. The settings are: 'OPAC Inactivity Timeout (in seconds)' set to 600, 'Staff Login Inactivity Timeout (in seconds)' set to 12000, 'Lost Materials Processing Fee' set to \$10.00, and 'Default Item Price' set to \$15.00. Each setting has an 'Apply' button and an 'Apply to all Locations' button. At the bottom, there is a field for '"FROM" email address for patron notices' with the value 'info@trainingterrace.ca' and an 'Apply' button. A note at the bottom states: 'I. "Apply to all Locations" will force the new setting to be applied to all locations in the location dropdown.'

3. Many libraries have the OPAC Inactivity Timeout set to 600 seconds (10 min) and the Staff Login Inactivity Timeout set between 10,000 and 15,000 seconds (~2.5-4.5 hours). If these values are left blank the OPAC or the staff client will time out at the default settings. The default setting for the OPAC timeout is 420 seconds (7 minutes). The default setting for the staff client timeout is 7200 seconds (2 hours).
4. The Lost Materials Processing Fee is a default amount that is charged on top of the cost of the item if it is lost.



5. The Default Item Price is a default amount that is charged if the price is left blank when the item is catalogued (see Edit Item Attributes).
6. The “FROM” email address is for automatically generated patron notices (i.e. email overdue, email holds notification). It is good practice to set up a generic account, like [info@nameofyourlibrary.ca](mailto:info@nameofyourlibrary.ca) so that one person’s individual email inbox doesn’t get cluttered with emails that were not sent.

## Non Cataloged Types Editor

1. Select *Non Cataloged Types Editor* under *Library Configuration*.



This is where you configure your non-catalogued types that appear in the dropdown menu for non-catalogued circulations. See page 20 of the Circulation training handout for more information on this type of circulation.

2. To set up a new non-catalogued type, type the name in the left hand box, and choose how many days the item will circulate for. Click *Create*.

Welcome

### Non Cataloged Types Editor

Create a new non-cataloged type

☐ Circulate In-House? (??)

Name	Owning Location	Duration	Circulate In House	Edit	Delete
Comic books	Sitka Consortium	14 Days	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Donated Magazines	Sitka Consortium	14 Days	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Magazines	Terrace	14 Days	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Paperback Book	Sitka Consortium	14 Days	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

### NOTE

Select the *Circulate In-House* box for non-catalogued items that will circulate in house. This can be used to manually track computer use, or meeting room rentals.

This is what the dropdown menu for non-catalogued circulations in the patron checkout screen looks like:

Refresh Check Out Items Out Holds Bills

Check Out

Barcode: [dropdown menu]

Barcode: BTE : Magazines  
SITKA : Comic books  
SITKA : Donated Magazines  
SITKA : Paperback Book

ate Title

Submit

## Statistical Category Editor

1. Select *Statistical Category Editor* under *Library Configuration*.



This is where you configure your statistical categories (stat cats). Stat cats are a way to save and report on additional information that doesn't fit elsewhere. It is possible to have a stat cat for copies or patrons. Here are some examples of copy stat cats. You would see these when cataloging items in the *Edit Item Attributes* screen. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

- To create a new stat cat, enter the name of the stat cat, select if you want *Opac Visibility*, and select either patron or copy from the *Type* dropdown menu.

**Statistical Category Editor** Welcome tara

---

Create a new statistical category

Enter the name:  Owning Library:

Opac Visibility: ☐ On ☒ Off Type:

---

[Copy Stat Cats](#)
[Patron Stat Cats](#)

\* To edit or view information about an entry, click on the entry in the drop-down menu

Stat Cat Name	Owning Library	OPAC Visibility	Entries	Add Entry	Edit
<b>Gift Item</b>	Sitka Consortium	Off	Yes	<a href="#">Add</a>	<a href="#">Edit</a>
<b>Kids Books</b>	Terrace	Off	(none)	<a href="#">Add</a>	<a href="#">Edit</a>
<b>Vendor</b>	Terrace	Off	Amazon	<a href="#">Add</a>	<a href="#">Edit</a>

This is what the copy stat cat looks like in the *Copy Editor*.

**Copies**

**Copy Editor**

Templates:

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
<b>Status</b> In process 1 copy <b>Barcode</b> 26876598 1 copy <b>Creation Date</b> 2008-07-30 1 copy <b>Creator</b> tara 1 copy <b>Last Edit Date</b> 2008-07-30 1 copy <b>Last Editor</b> tara 1 copy	<b>Shelving Location</b> Juvenile books 1 copy <b>Circulation Library</b> BTE 1 copy <b>Owning Lib : Call Number</b> BTE : SCIE 1 copy <b>Copy Number</b> <Unset> 1 copy	<b>Circulate?</b> Yes 1 copy <b>Holdable?</b> Yes 1 copy <b>Age Protection</b> <Unset> 1 copy <b>Loan Duration</b> Normal 1 copy <b>Fine Level</b> Normal 1 copy <b>Circulate as Type</b> <Unset> 1 copy <b>Circulation Modifier</b> <Unset> 1 copy	<b>Alert Message</b> <Unset> 1 copy <b>Deposit?</b> No 1 copy <b>Deposit Amount</b> 0.00 1 copy <b>Price</b> 0.00 1 copy <b>OPAC Visible?</b> Yes 1 copy <b>Reference?</b> No 1 copy	<b>Library Filter</b> <b>BTE : Kids Books</b> <Unset> 1 copy <b>BTE : Vendor</b> <Unset> 1 copy <b>SITKA : Gift Item</b> Yes 1 copy



- Here are some examples of patron stat cats. Patron stat cats can be used to keep track of information like the high school a patron attends, or the home library for a consortium patron, e.g. Interlink. You would see these in the fifth screen of patron registration/edit patron.

**Statistical Category Editor** Welcome tara

---

Create a new statistical category

Enter the name:  Owning Library:

Opac Visibility: ☐ On ☒ Off Type:

---

[Copy Stat Cats](#)
[Patron Stat Cats](#)

\* To edit or view information about an entry, click on the entry in the drop-down menu

Stat Cat Name	Owning Library	OPAC Visibility	Entries	Add Entry	Edit
School	Sitka Consortium	Off	<input type="text" value="Burnaby Central Secor"/>	<a href="#">Add</a>	<a href="#">Edit</a>
aussie lift attendant	Terrace	Off	<input type="text" value="Mount Buller"/>	<a href="#">Add</a>	<a href="#">Edit</a>

This is what the patron stat cat looks like in the patron registration screen. It looks very similar in the patron edit screen.

5: tara@BTE-tara.training.sitka.bclibrary.ca

File Edit Search Circulation Cataloging

1 Register Patron

Print Page

Welcome tara

**Evergreen User Editor**

Note: required or invalid fields are marked with color [View Errors](#)

	Stat Cat Name	Owner	Value
<a href="#">1. User Identification</a>	School	SITKA	<input type="text" value="- None Selected -"/> or <input type="text"/>
<a href="#">2. Contact Info</a>	aussie lift attendant	BTE	<input type="text" value="- None Selected -"/> or <input type="text"/>
<a href="#">3. Addresses</a>			
<a href="#">4. Groups and Permissions</a>			
<a href="#">5. Statistical Categories</a>			
<a href="#">6. Surveys</a>			
<a href="#">7. Finish</a>			

## Surveys

This tip sheet will illustrate how to create a survey, show where the survey responses are saved in the patron record, and explain how to report on surveys.

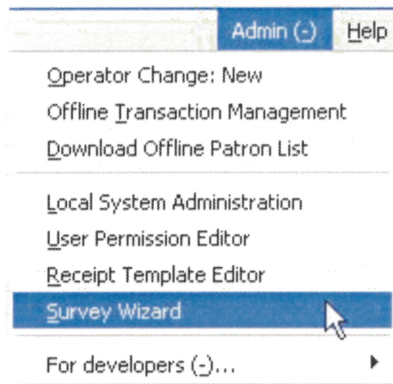
Survey questions show up on the 6<sup>th</sup> patron registration screen, or on the 6<sup>th</sup> patron edit screen. Survey questions can be optional or required. Some examples of survey questions might include: Would you use the library if it were open on a Sunday?, Would you like to be contacted by the library to learn about new services?, Do you attend library programs?

Surveys come up when a patron is first registered. If you would like staff to ask the survey questions when the patron's library card is renewed, you'll need to make that part of local procedure.

It is possible to run reports on survey questions. For example, you could find out how many people say they would use the library if it were open on a Sunday, or you could get a list of patrons who say they would like to receive marketing material from the library.

Currently it is not possible to edit or delete a survey that you have created, please contact support if you need this done.

1. Under the top right hand *Admin (-)* menu, select *Survey Wizard*.





2. Give the survey a name and a description. Select if the survey will be required. Currently surveys are only visible in the staff client, so disregard the poll format, OPAC visible and Staff client options.

The screenshot shows a window titled "Add a Survey Wizard" with a subtitle "Welcome to the Add a Survey Wizard" and "Initial Settings". The form contains the following fields and options:

- Available to:** A dropdown menu with "Terrace" selected.
- Name:** A text box containing "newsletter".
- Description:** A text box containing "opt in for newsletter/marketing |from the library".
- Required:** A checkbox that is checked.
- Poll Format:** An unchecked checkbox.
- OPAC Visible:** An unchecked checkbox.
- Staff Client:** A checked checkbox.
- Start:** An empty text box.
- End:** An empty text box.

**NOTE:** If you are scheduling a survey for a specific time, ensure to enter the date in the YYYY-MM-DD format.

3. Fill in the survey question and click *Save this Question*.

The screenshot shows the same window titled "Add a Survey Wizard", but the subtitle is "Completing the Add a Survey Wizard" and the text below it is "Add Questions for Survey: newsletter". The form contains:

- #1** A question text box containing "Do you want to receive newsletters/marketing material from the library?".
- Save this Question** A button circled in red with a mouse cursor pointing to it.

4. Fill in each response to the survey question, clicking on *Save this Response* after each response. Later the responses will appear in the dropdown menu in the order that they are entered.

The screenshot shows a window titled "Add a Survey Wizard" with a subtitle "Completing the Add a Survey Wizard" and "Add Questions for Survey: newsletter". It displays two questions. Question #1 is "Do you want to receive newsletters/marketing material from the library?" with a dropdown menu showing "a) Yes". A red circle highlights the "Save this Response" button next to the dropdown. Question #2 is identical but has no response entered yet, and its "Save this Question" button is visible.

This screenshot is similar to the previous one, but the dropdown menu for question #1 now shows "b) No". The "Save this Response" button is still highlighted with a red circle. Question #2 remains unchanged.

5. Click *Finish*.

This screenshot shows the "Add a Survey Wizard" window with three options in the dropdown for question #1: "a) Yes", "b) No", and "c) No". The "Save this Response" button is visible. At the bottom of the window, there are three buttons: "< Back", "Finish", and "Cancel". A red circle highlights the "Finish" button, indicating the final step to complete the wizard.



This is what the survey looks like in the patron registration/edit screen. Note that in this example this survey question appears in red and is required as the *Required* box was checked in Step 2.

1: tara@BTE-tara.training.sitka.bclibrary.ca

File Edit Search Circulation Cataloging Admin (-) Help

1 Register Patron

Print Page

Welcome tara

### Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

[1. User Identification](#)

HP :

Do you like Harry Potter?

[2. Contact Info](#)

Sundays :

Would you use the library if it were open on Sundays?

[3. Addresses](#)

newsletter : opt-in for marketing from the library

Do you want to receive newsletters/marketing material from the library?

[4. Groups and Permissions](#)

[5. Statistical](#)

To see a patron's response to a survey, retrieve the patron record. Click on *Info* button, and then on *Surveys* tab to see the response.

3: tara@BTE-tara.training.sitka.bclibrary.ca

File Edit Search Circulation Cataloging Admin (-) Help

1 Patron: Robertson, Tara

Robertson, Tara

(See Notes) (Has Bills) (Has Overdues)

Refresh Check Out Items Out Holds Bills Edit **Info** Exit

▼Status

Sitka Team

BTE

Internet: Unfiltered

Expires on 2011-01-26

Holds: 1

Notes

Stat Cats

**Surveys**

Group

Survey # 4 opt-in for marketing from the library Required Not OPAC Visible

1 Do you want to receive newsletters/marketing material from the library?

Last Answered on: 11/21/08 Answer: Yes

## Reporting on surveys

There is a template for reporting on patron surveys in the reporting interface, under SITKA\_templates > Patrons > Patron Surveys. If you need help tweaking this template please contact support.